FORMS MANAGEMENT INFORMATION SYSTEM
INPUT REQUIREMENTS
(BY DOCUMENTS USED)

1. Request for Approval of Form (Form 30)

Document needed to add a new record to file or to revise or
overprint a form and so change a record in the system. This
request contains the initial data elements and will be the
document that also activates the ordering of the form.

2. Replenishment Approval (Form 30-a)

The OPI approves a reprint or makes revisions, changes, or
to obsolete the form. If the action is a reprint the approval
on this Form 30-a will go back into the system from the OPI,
however, if a revision or change is to be made the 30-a is re-
turned to the Central Forms Staff before going into system.

3. Source of Printing

This is furnished by Printing Services, Office of Logistics,
and the item comes into the system via a PSD note on the Form
30 or Form 30-a.

4. Obsolete Notice

Requests to obsolete a form from the system originate in OPI
or Central Staff. It will contain information about replace-
ment form if applicable. This history and audit trail is
permanent in system. These items may enter the system on a
Form 30 or Form 30-a but many times it is a memorandum.

5. Change Notice

Requests to alter data elements in the system originate with OPI
and Central Staff. This notice should allow for as many as six
changes to the record at one time. Central Staff would have
final information on changes and would enter it to system.

6. Specifications

Form 30-b is a formatted list of details of construction and
design of form - also it includes general terms and conditions
provided by Central Staff.

7. Rec⸱ ·ng Report

Actual quantity ·ceived and its acceptance into the system provided by De⸱⸱·.

8. Requisition for Material (Form 88 or 1490)

This will activate the system to draw and ship a supply from stock, adjust totals of inventory on hand, and as an instruction to start the replenishment system.

FORMS MANAGEMENT INFORMATION OUTPUT REQUIREMENTS

1. Forms Management Reports

    a. Monthly list of forms transactions.

    b. Periodic report of forms conditions such as stock status, problem areas, replenishment data, outstanding orders, etc. Program should provide for reports information selected and sorted from data in any of the fields, or dates, volumes, costs, transactions, and calculations in the system.

2. Forms Management Reference Information

    Until the system is on-line it should continue to provide the forms information listings now produced in Forms number sequence, alphabetical by Form title, numerical by Functional Code, and by Office of Primary Interest. These are needed for Records Officer corrective action as well as data requirements in the Central Staff, Printing Services, and several Logistics offices.

3. Replenishment Notices - Form 30-a

    Individual forms preaddressed to OPI Record Officers when stock level point is reached.

    a. Notice will include quantity on hand, quantity last ordered, date of last supply received, and recommended replacement order.

    b. Include, if applicable, narrative statement on pending changes, suggestions, legislation, etc.

    c. Notice will contain information for action to be taken and provide for action as system INPUT.

    d. Notice will contain a deadline date to meet normal procurement lead time.

4. Query Capability On Each Form

    a. This access to be cross-referenced by Form Number, Title, Stock Number, function, and related feeder forms.

    b. Response will have available any information on each form in the system.

5. Requisitions (or Contract) for printing.

Forms 70, 1270, 144, and SF-1.

6. Specifications

On each form (for PSD this can be on the requisition) but for other sources this would be a separate formatted printout. See input for specification terms and conditions details.

7. Pick and Ship Slip

Via a requisition if form requested is stock item and on shelf, balance on hand will be reduced by quantity requested and a pick and ship slip will be forwarded to Depot. Activating input is Form 88.

8. Out of Stock Notice and Order Cut Notice

In event balance on hand does not cover requisition or supply is awaiting a "due in", the amount requested will be either cut to a minimum or placed on "back order". In either case requisitioner will receive an out of stock notice or order cut notice.

FORMS MANAGEMENT INFORMATION SYSTEM
DETAILS ON DATA ELEMENTS

STAT

1. Stock number for 500 forms which are issued by Logistics thru
   [   ] These stock numbers are essential to parts
   of Office of Logistics, RMO's and Logistics officers in each
   of the components and all [   ]
   Not essential to Forms Management, or Printing Services as we work
   on form numbers - i.e., case files in FMB, negative and plate files
   in PSD. Even at Depot and BSO forms are in numerical order in
   bins and on shelves.

   Entered by Catalog, Office of Logistics.

2. Transaction Code - New, Revised, Reprint, Overprint.

   a. New - to create new record in system.

      Entered by Forms Management Branch.

   b. Revised - to show latest edition and show disposition of
      previous editions.

      Entered by Forms Management Branch.

   c. Reprint - update system on amount of copies ordered and
      available for issuing.

      Entered by OPI or PSD.

   d. Overprints - existing Agency or other government agency forms
      where repetitive information is preprinted for ease of
      handling.

      Entered by Forms Management Branch.

3. Estimated Monthly Usage

   Entered on new forms only. For future reprints and revision
   this should become Actual Monthly Usage.

   Entered by OPI on reprints.

4. a. Quantity ordered (in Form Units) - amount of forms to be printed
      new, revised and overprint. (a 10-part form is one form unit)

      Entered by OPI or PSD/Procurement.

   b. Quantity ordered (in sheets) - amount of sheets to be printed.
      (A 10-part form is 10 sheets.) (This shows sheets of
      paper that eventually are filed and end up in Records Center.)

      Entered at the same time as 4.a.
      Quantity ordered.

   c. Quantity received (in unit of Logistics issue) (cartons or
      packages of 500 to 1500 forms units).

      (1) Can vary 10 to 20 percent in shortages and overages from
          quantity ordered.

Partial shipments are often received.

d.   ntity Received Accepted or Disapproved.   (In Logisitics
    t of Issue.)

(1) Partial shipments

(2) Entire shipments.   following acceptance
                        by Central Forms Staff and OPI.

e. Quantity Issued - by station and units (by Logistics Unit and
    Issue and station codes).
                        Entered

5. Related/Feeder Forms - These may be first pages and continuation
        sheets of related forms or various interdependent forms used
        in one office procedure where information from one form matches
        or depends on other like forms.
                        Entered by Forms Management Branch.
                        (2 digit code - AA-22)

    *This item should also alert the system that these several
     related forms should be ordered together as a package -
     even though amounts of each may vary on the forms.

            Examples - Information Reports - DDP
                       Information Reports - DDI
                       Dispatch forms
                       Cable forms
                       Security combination envelopes

6. Disposition of Stock

    a. Use or destroy previous editions of revised forms.

    b. To use or destroy remaining stock of obsoleted forms.
                        Entered by Forms Management Branch.

7. Form Unit - the unit of quantity in which each form is procured and
        processed by OPI and Central Staff. (See 4.a. above - a 10-part
        form is one form unit.)
                        Entered by Forms Management Branch.

8. Unit of Issue (the Logistics unit or quantity in which forms are
        received stored requisitioned and issued by Depot) - form units
            packaging. (100 cards, cut sheets, or sets per package; 1500
            continuous sets per carton.)

                        Entered by Catalog/Office of Logistics.

2

9. Area of Use - where forms are to be used. This is prescribed by
    the Regulations and Handbooks.

STAT

Entered by Forms Management Branch.

10. Shipment Category - how forms are shipped to [   ] and   STAT
    Overseas.

STAT

Entered by Forms Management Branch.

11. Supply Source - whether form is a Stock or Non-stock item. If Stock
    it is available from Building Supply Office - if Non-stock it is
    available from Office Primary Interest.

    (1) A Stock number is shown for Stock forms. No Stock number
         is shown for Non-stock forms.

    (2) "S" for Stock forms. "N" for Non-stock forms.
         Entered by Forms Management Branch.

12. Security Classification - only preclassified forms are coded. All
    other forms are blank in this area.

        1 - Preclassified CONFIDENTIAL   2 - PRECLASSIFIED SECRET
                             Entered by Forms Management Branch.

13. Functional Codes - codes assigned to indicate the basic function
    of the form. Maximum of 5 codes (2 digit) per form. See list
    attached.
                             Entered by Forms Management Branch.

14. Office of Primary Interest - A code of two numbers entered to
    identify the office responsible for the form.
                             Entered by Forms Management Branch.

        (Future system should include up datable list of Logistics and
        Records Management Officers in the OPI's. Further the system
        should include with the name, his phone and address. At present
        the OPI code is the Office. In the future this should provide
        for more specific identity of Directorate, Office, and Unit
        therein that are responsible for each form.)

3

15. Form Number - number assigned by this Agency or other government agency.

Entered by Forms Management Branch.

16. Edition Date - latest edition of the form.

Entered by Forms Management Branch.

17. Title (as printed on form) - a descriptive statement of function or content is given if the form is not titled. (could be 20 or 30 words)

Entered by Forms Management Branch.

STAT

  a. Prescribing Regulation - those prescribing the use of a form. (i.e., [   ]) (Could be several letters and numbers.)

Entered by Forms Management Branch.

18. Suggestions - a narrative statement on approved or pending suggestions relating to future form changes

(This note would print out on the Replenishment Notice Form 30-a to alert the OPI of pending action.)

Entered by Forms Management Branch.

19. Specifications - details of construction, format, and design of form.

PSD uses specifications indicated by OPI and FMB on Printing Requisition. GPO and Commercial Printers receive two pages of form specifications on Form 30-b. Specification requirements set by OPI and Central Staff and are in file.

Entered by Forms Management Branch.

20. Source of Procurement - where form is printed PSD, GPO, Commerical, Other Government Agency, State of Virginia, State of Maryland, D.C. Government.

Entered by Printing Services Division.

21. Agency Codes - these indicate the Agency responsible for and controlling the form (i.e., agency form, GSA, DOD, Department of State, etc.)

Entered by Forms Management Branch.

22. Lead Time - These 30-60-90-120-day time periods are based on the complexity or special qualities of the form and where the form is to be procured. This lead time includes the OPI coordination, and time for contracting and/or scheduling as well as production and delivery. Coordinated among OPI, Central Staff, Printing Services, and Logistics Supply Management.

Entered by Supply.

4

23. Proce⸱⸱ al Analysi ⸱ata

This narrative information details the need and use of the
form, the distribution of the copies and component reliance
on this form. This data is essential for Systems Analysis
and coordination. Forms Consolidation, simplification or
deletion grow from this data on file. Conversion from manual
systems to punch card, microfilm or computers uses this
Analysis data. The disapproval of the forms request or its
modification develop from this system and procedural Analysis
data received on the Form 30 request and subsequent surveys.

Entered from #30 by Forms Management
Branch.